

Social Media's Impact on Personal Finance and Investing

The writing is on the wall. An upsurge in social media participation, fueled by increasing accessibility and popularity of online peer collaboration, is signaling a **revolution in the investor decision-making process**. Investors who are already engaged provide a glimpse into a world transformed by social media, where perceptions of advisors, providers, and products are constantly subject to peer validation and scrutiny.

Firms failing to fully understand these emerging media risk relegating the fate of their brand to consumers. Our report will help you recognize the transformative power of social media and inform a strategy of active engagement.

ISSUES ADDRESSED

- How many, and what types of, Americans are using social media?
- To what extent have social media caught up with personal finance and investing?
- Which financial services brands are investors reading and talking about on social media — and what are they saying?
- What impact are social media having on:
 - Interest in specific investment products and services?
 - Confidence in making investment decisions independently?
 - Perceptions of financial services companies?
 - Decisions to use — or not to use — specific products or brands?
 - Reliance on — and trust in — traditional information sources, including advisors and official company websites?

WHAT IS SOCIAL MEDIA?

Social media include all of the ways people can use Internet to directly interact with other people to share information, experiences, and opinions about themselves, products, or topics of interest.

METHODOLOGY

Web survey among 1,000 U.S. online consumers and 1,056 high net-worth investors regarding their awareness, familiarity, and usage of social media for personal finance and investing. All respondents were required to have responsibility for household financial decisions.



DELIVERABLES

Presentation-style report containing a detailed summary of findings, subgroup analysis by key demographic variables (e.g., age, income, education, assets), and strategic implications for your brand.

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Custom Research

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► SYNDICATED RESEARCH

The most up-to-date and comprehensive understanding of emerging issues and trends lets us continuously generate insight and action strategies for clients. Products and services include white papers, syndicated reports, and “sponsored” papers.

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Our own proprietary data assets combine with client supplied information and primary research to produce powerful insights and recommendations toward product, trend, and client experience. The result is significantly improved bottom-line performance.



Subscription Agreement

Social Media's Impact on Personal Finance and Investing™

DELIVERABLES:

- A presentation-style report containing a detailed summary of findings.
- Findings to include subgroup analysis by key investor demographics.

COST & BILLING PROCEDURE:

- **Cost:** \$7,500
- **Billing:** Cogent requires payment within 30 days of the invoice date.

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